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Gateway User Guide

Form 4A BUDGET REPORT

Table of Contents

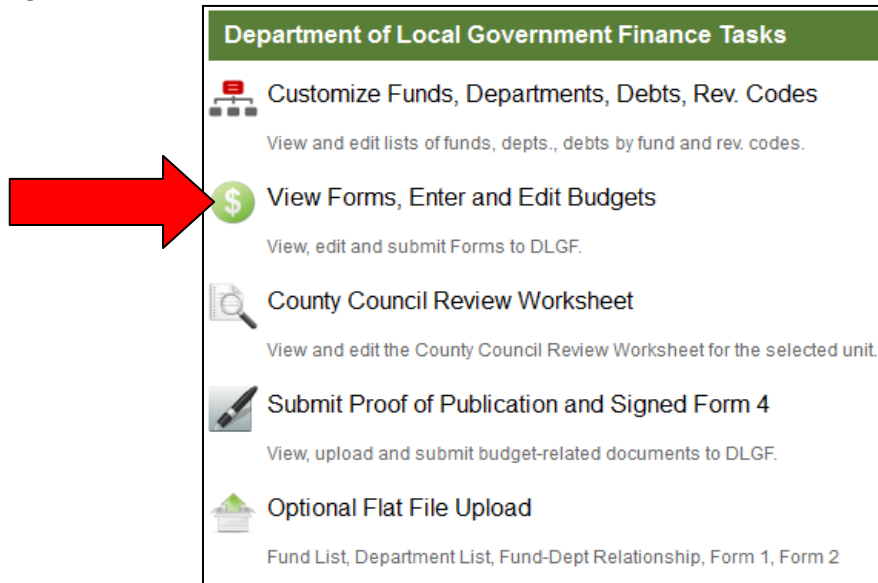
Getting Ready.....	2
Accessing the Form 4A.....	2
Ensuring Proper Options are Available on the Form	3
Entering Data on the Form 4A	4
Completing Form 4A by Pulling Form 1 Values.....	4
Completing the Form 4A in Stages.....	5
Signing the Form Electronically.....	5
Marking the Form “Ready to Submit”	6
Viewing and Printing the Form	8

Getting Ready

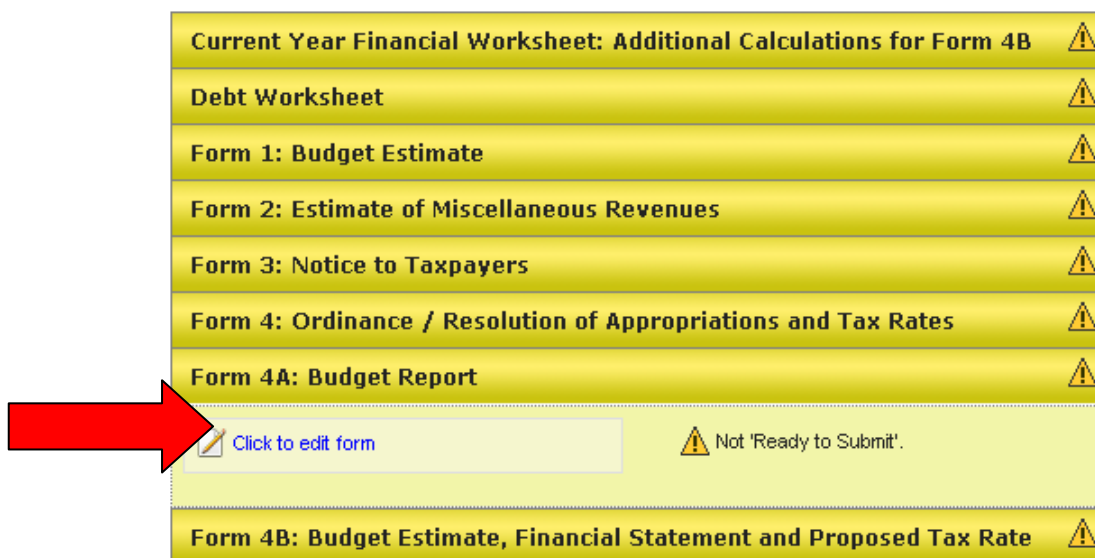
Form 4A presents the unit's budget subtotaled by fund, department, and major classification (Personal Services, Supplies, Other Services and Charges, Capital Outlays, Debt Service, and Township Assistance).

Accessing the Form 4A

First, navigate to the Budget Form Menu by selecting your unit and then clicking "View Forms, Enter and Edit Budgets."



From the Budget Form Menu, click on the link on the left side of the Form 4A box that says, "Click to edit form." This will load the form.



Ensuring Proper Options are Available on the Form

Form 4A is divided using drop-down menus. The first drop-down menu allows you to select a fund. Once a fund is selected, Gateway will populate a second drop-down menu for you to select the department.



Select Fund:

0101 - GENERAL

Select Department:

0001 CLERK OF CIRCUIT COURT (COUNTY CLERK)

To ensure that the proper options are available in these drop-downs, please be sure that you have completed all three steps on the left-hand side of the Customize Unit area. For assistance please view the [Customize Units User Guide](#).

Customize Funds and Department Lists



Customize Funds List



Customize Departments List



Customize Departments by Fund List

View and cross-index departments by selected fund.



Customize Revenue Codes List


Select revenue codes for use within this unit's Form 2.



Customize Debts by Fund List

View and cross-index debts by selected fund.

If Form 4A looks like the image below for a particular fund, that means that the fund-department link has *not* been specified in the Customize Unit area. If your unit of government is not departmentalized, you may leave the department field as "0000 No Department."



Select Fund:

0005 - CASINO/RIVERBOAT

Select Department:

0000 NO DEPARTMENT

Entering Data on the Form 4A

For each subcategory, Form 4A collects two pieces of information: the Published Amount and the Adopted Amount.

DEPARTMENT: 0000 NO DEPARTMENT

Click Here to Insert
Form 1
published amounts
↓

Click Here to Insert
Form 1
adopted amounts
↓

Published Amount			Adopted Amount		
10000	PERSONAL SERVICES	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	
20000	SUPPLIES	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	
30000	OTHER SERVICES AND CHARGES	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	
40000	CAPITAL OUTLAY	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	
60000	DEBT SERVICE	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	
9999	TOTAL	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	

The **Published Amount** is the amount that is proposed at the beginning of the budget process and published in the newspaper. The **Adopted Amount** is the amount that is approved by the fiscal body and adopted by ordinance or resolution. Form 4A summarizes the amounts entered in Form 1 into category totals.

Completing Form 4A by Pulling Form 1 Values

Form 4A is simply a summary of Form 1. Provided at least the published column of Form 1 has been entered, the Form 1 amounts can be pulled into Form 4A by clicking the button that says “Insert ALL Unit Amounts from Form 1”. Clicking this will automatically pull the values from all the funds and departments in the Form 1 into the Form 4A in a single click.

Select Fund:

0081 - RAINY DAY

Select Department:

0000 NO DEPARTMENT

Insert ALL Unit Amounts from Form 1 ↓

DEPARTMENT: 0000 NO DEPARTMENT

Click Here to Insert
Form 1
published amounts
↓

Click Here to Insert
Form 1
adopted amounts
↓

Published Amount			Adopted Amount		
10000	PERSONAL SERVICES	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	
20000	SUPPLIES	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	
30000	OTHER SERVICES AND CHARGES	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	
40000	CAPITAL OUTLAY	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	
60000	DEBT SERVICE	\$ <input style="width: 80%;" type="text"/>		\$ <input style="width: 80%;" type="text"/>	



If you happen to change any information on the Form 1, it is important that you re-pull the information into Form 4A. This will help prevent incorrect amounts being pulled into other forms.



Completing the Form 4A in Stages

Since units propose budget figures at the beginning of budget season and adopt them months later, you may copy the Form 1 amounts while only the published column is completed and then return later to pull the adopted values into Form 4A. Populating the Form 4A updated information entered in Form 1 will be done with the single click of the “Insert ALL Unit Amounts from Form 1” blue copy arrow.

Select Fund:
0061 - RAINY DAY

Select Department:
0000 NO DEPARTMENT

Insert ALL Unit Amounts from Form 1

DEPARTMENT: 0000 NO DEPARTMENT

	Published Amount	Adopted Amount
10000 PERSONAL SERVICES	\$	\$

Click Here to Insert Form 1 published amounts

Click Here to Insert Form 1 adopted amounts

Signing the Form Electronically

At the bottom of Form 1, there is a box for you to place an electronic signature on the form. Only the user with submission rights will see the signature box.

Form Signature

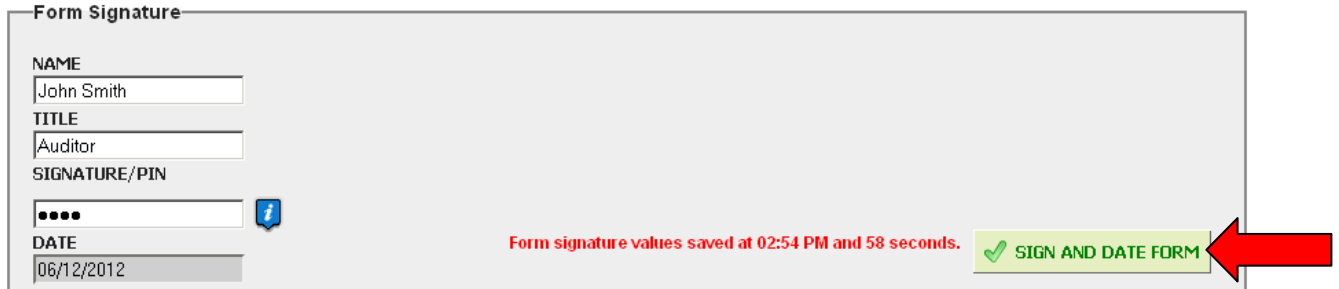
NAME
TITLE
SIGNATURE/PIN
DATE

SIGN AND DATE FORM

I hereby acknowledge that the submission of this document through the Gateway password and PIN system constitutes an "electronic signature" as defined in IC 5-24-2-2. This submission is intended to, and hereby does, constitute authentication and approval of the submitted document as required by the Indiana Code. I understand that this electronic signature takes the place of my handwritten signature and accomplishes the same purposes as would my handwritten signature in the same circumstance. I further acknowledge that this electronic signature has the same force and effect as my handwritten signature and can and will be used for all lawful purposes. I affirm that I have the real and apparent authority to electronically sign and submit this document on behalf of the unit.

The signature box will be invisible to users with edit or read-only rights.

To sign the form, first type your name and title into the signature box. After that, you will need to enter a four-digit PIN code. This PIN code has been sent to the person with submission rights via email. You may contact the DLGF at gateway@dlgf.in.gov or at (317) 232-3777 in the event that you have lost or not received a PIN code. Once you select "Sign and Date Form," today's date will automatically populate the date field.



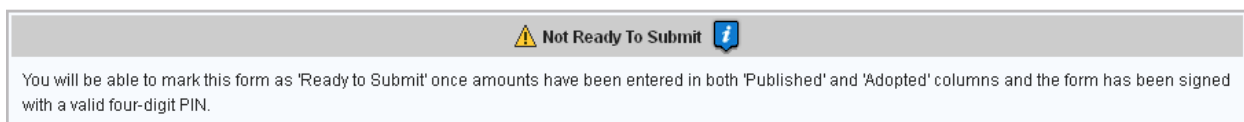
Once you see the red text stating Form Signature Values Saved, you have successfully signed Form 4A.

Marking the Form "Ready to Submit"

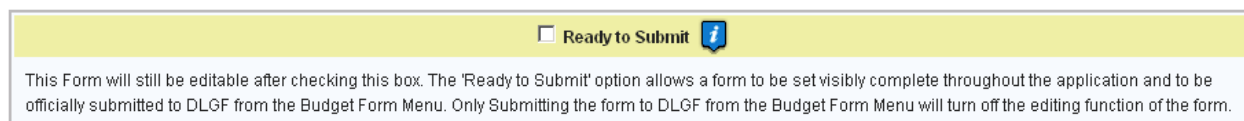
At the bottom of Form 4A and all other forms you will notice the Ready to Submit status boxes. Before you complete the form you will notice a grey box that is titled Not Ready to Submit.

The budget forms have a feature built in called validation. This does not allow the form to be marked as Ready to Submit, or be submitted until the required fields are completed. Validation will help prevent some commonly found errors in previous years. Under a closer look, you will notice that the box states,

*"You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been **signed** with a valid four-digit PIN."*




Once information has been entered in the published and adopted columns, and you have signed the form with your PIN, the yellow Ready to Submit option will appear. This gives users the ability to mark the form as ready to submit by clicking on the check box. You will not want to check this box until all the published and adopted amounts columns are entered for all funds.



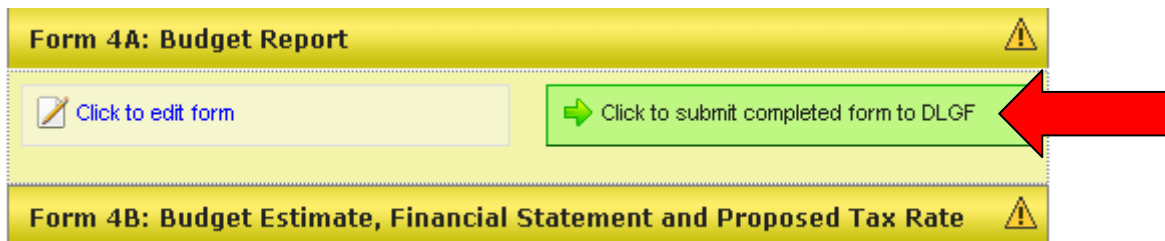
Once this box is checked, the box will turn green and the form will now be marked as Ready to Submit. Form 4A can still be edited until it is submitted.





☒ Ready to Submit 


This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.


Note that after Form 4A has been marked as “Ready to Submit”, Form 4A under the Budget Form Menu now shows a green submit option.



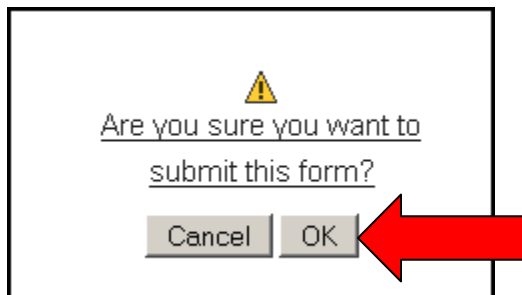
Form 4A: Budget Report 


 Click to edit form

 Click to submit completed form to DLGF

Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate 

If you have completed your Form 4A and will not need to make any changes, you may click on the green “Click to submit completed form to DLGF” button. You will notice a pop-up box asking you if you are sure you want to submit this form. If you are ready to submit, simply press “OK.”

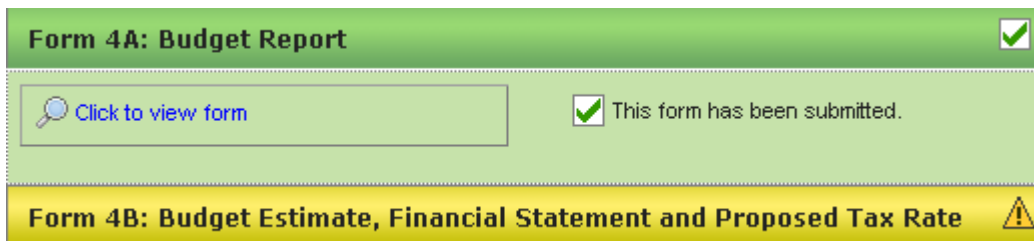






Are you sure you want to
submit this form?


Cancel OK


As you will note below, Form 4A on the Budget Form Menu will now appear green and will now only have the option to view the form.



Form 4A: Budget Report 

 Click to view form

 This form has been submitted.

Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate 

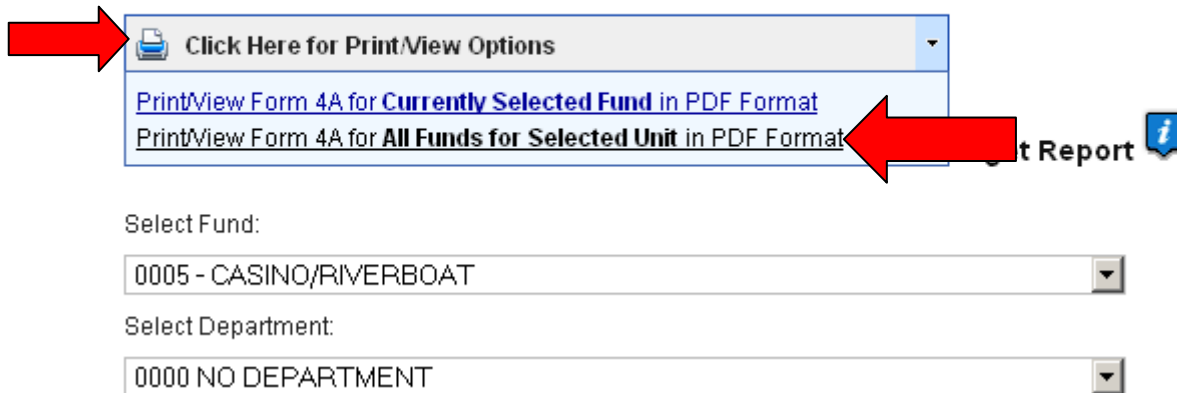
You may no longer edit a form once it is submitted. If you have submitted a form by mistake, please contact the DLGF at gateway@dlgf.in.gov or at (317) 232-3777.

Viewing and Printing the Form

At any point, Form 4A can be printed directly from Gateway. Click the button at the top-left corner of the form that reads, "Click Here for Print/Viewing Options." Next click on the link that reads, "Print/View Form 4A for Currently Selected Fund in PDF Format."

[Select Unit](#) > [Unit Main Menu](#) > [Budget Form Menu](#) > **Form 4A**

Selected Year: 2013 | Selected Unit: DLGFIBRC County - 9992 Dlgf City 10, DLGFIBRC Co.



Click Here for Print/View Options

[Print/View Form 4A for **Currently Selected Fund** in PDF Format](#)

[Print/View Form 4A for **All Funds for Selected Unit** in PDF Format](#)

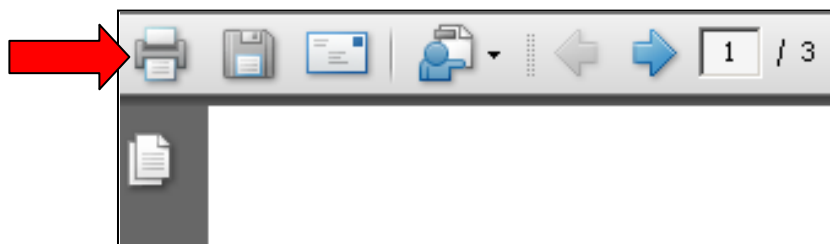
Select Fund:

0005 - CASINO/RIVERBOAT

Select Department:

0000 NO DEPARTMENT

Once you see the page appear in a new window, simply click on the printer icon on the top left hand corner to print. You may also select the save icon to the right in order to save the form as a PDF which will also allow you to email copies of your budget or post them on a website.



Congratulations! You have successfully submitted your Form 4A. Please see our other user guides for assistance with other forms. If you have any questions, please email the Gateway inbox at gateway@dlgf.in.gov.